

## **REMARKS**

### **Introduction**

Claims 1, 2, 4-18 and 20-23 were pending. Claims 1, 18, and 23 are independent. Claims 1, 2, 4, 18, 20, 21 and 23 have been amended. Claims 24-25 have been added.

Claims 2, 4, 20 and 21 have been amended to correct the antecedent basis problem indicated by the Examiner. These claims now refer to “business rules,” found in amended claims 1 and 18, instead of “visibility rules,” found in original claims 1 and 18.

### **Rejections under 35 U.S.C. § 102(b)**

Claims 1, 2, 4-18 and 20-23 stand rejected under 35 U.S.C. 103(a) as being unpatentable over U.S. Patent Application Publication No. 2004/0176973 (Lapeze et al.) in view of U.S. Patent Application Publication No. 2002/0184527 (Chun et al.).

Lapeze et al. describes a contact management and control system for managing contact events associated with an enterprise. The contact management system detects a contact event and actuates a contact manager to retrieve information pertaining to the contact event from a contact library. If new information is associated with the contact event, the contact library is updated with the new information. Information in the updated library is subsequently disseminated across the enterprise. A contact event has a set of identifying parameters. When a contact event is detected, the event's parameters are compared to a set of predetermined values to detect a match. Parameters associated with the contact event can include a name, priority, subject matter, or any set of flags and codes that may resemble a paper-based phone log system. These

parameters are then compared with a set of predetermined values, such as a set for detecting or responding to important contact events. If a match exists, then, in response to the contact event, a number of commands are executed according to a predetermined set of at least one rule.

In contrast to the method described by Lapeze et al., amended claims 1, 18, and 23 and new claim 24 of the present application recite, *inter alia*, a method, system and programming device configured to execute steps for managing call reports in a wireless network environment comprising the steps of receiving a message and information regarding a client matter, wherein the message and information provide a summary of an event; determining a distribution list by applying a predetermined set of business rules that encapsulate legal and ethical requirements for allowing access to the client matter, wherein the business rules include restrictions based upon the position of a viewing employee within a company, the position within the company being based on which matters the employee has worked on as well as the matters that are within the employee's current responsibility; creating a call report, the call report including the received message; and allowing access to the call report based on the distribution list.

Lapeze et al. does not describe or teach steps for determining a distribution list by applying a predetermined set of business rules that encapsulate legal and ethical requirements for allowing access to the client matter, wherein the business rules include restrictions based upon the position of a viewing employee within a company, the position within the company being based on which matters the employee has worked on as well as the matters that are within the employee's current responsibility. In Lapeze et al., a contact event's parameters are compared to a set of predetermined values to detect a match, which can include a name, priority, subject

matter, or the like. These parameters are then compared with a set of predetermined values, such as a set for detecting or responding to important contact events. There is no description in Lapeze et al. that the predetermined parameters or rules can include a set of predetermined business rules encapsulating legal and ethical requirements which are applied by the server software to determine whether a user has the right to access a call report. In paragraph [0016] of Lapeze et al., a contact record can be manipulated based on at least one parameter by an authorized user. The authorized user can be the recipient of the contact event, the sender, and a person designated by the sender. None of these people are authorized based on employee position and the matters the employee is working on.

Further, Lapeze et al. does not describe or teach that the message and information received provide a summary of an event. Lapeze et al. describes at paragraph [0015] that “each contact record can include a series of text, codes, and flags that can be set through radio buttons, or comparable input methods, on the user interface. One set of codes used in the contact manager application may be similar to an attorney’s paper phone logs.” Lapeze et al. does not describe any phone logs as including a summary of an event by the attorney.

Chun et al. fails to correct the deficiencies of Lapeze et al. Chun et al. describes an apparatus in the form of an appliance that can be installed in an existing network. The appliance comprises a single modular device that integrates security to allow the appliance to be located at a network gateway where all incoming and outgoing data exchanges must pass through. The appliance, as described, can be installed or plugged into a computer network between business partners, and can perform many of the difficult and tedious data manipulation operations in a secure, transparent, and substantially automated manner. Examples of operations

that can be performed include encryption, single sign-on authentication, auditing, shaping data to a common intermediate format for exchange between partners, other auditing of data exchanges in transaction logs, filtering data for privacy compliance and risk management, error detection and correction, mapping internal non-standard data elements to external standard code sets, proxy and protocol re-writing, etc.

Chun et al., either alone, or in combination with Lapeze et al., does not describe or teach steps for determining a distribution list by applying a predetermined set of business rules that encapsulate legal and ethical requirements for allowing access to the client matter, wherein the business rules include restrictions based upon the position of a viewing employee within a company, the position within the company being based on which matters the employee has worked on as well as the matters that are within the employee's current responsibility. At paragraphs [0033] and [0043] of Chun et al., access to "resources" in a system employing the invention of Chen et al. can be based on typical software properties such as username, password, and the software owner of the resource. Access rules can be based upon users/group/machines properties that are typically specified in the operating system of the application. Furthermore, as the Examiner asserts, at paragraph [0054], filtering of who has access to the data can be based on minimum need-to-know rules, such as business security models and mandatory privacy regulations such as HIPPA. There is no further indication or disclosure of what the business rules are, and certainly no description of rules based on an organization or position of senders/receivers.

Further, Chun et al., either alone, or in combination with Lapeze et al., does not describe or teach that the message and information received provide a summary of an event. The

apparatus of Chun et al. is a filter which only allows or blocks information from passing to a viewer. There is no indication of the nature of the content of the messages passed.

Accordingly, applicant submits that neither Lapeze et al. nor Chun et al., alone or in combination, discloses or teaches the invention recited by amended claim 1, 18, and 23 of the present application. Claims 2, and 4-17, and 24-25 ultimately depend from claim 1; and claims 19-22 ultimately depend from claim 18. Since claims 1, 18, and 23 have been shown to be patentable, the claims depending therefrom are likewise deemed to be patentable, for at least the reasons described above with respect to the patentability of claims 1, 18, and 23.

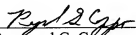
Thus, applicant submits that each of the claims of the present application are patentable over each of the references of record, either taken alone, or in any proposed hypothetical combination. Accordingly, withdrawal of the 35 U.S.C. 103(a) rejections to the claims based on Lapeze et al. in view of Chun et al. is respectfully requested.

**Conclusion**

In view of the above remarks, reconsideration and allowance of the present application is respectfully requested. A \$100 fee is believed to be due in connection with this Amendment for the addition of two (2) additional claims in excess of twenty (20). If, however, other fees are deemed necessary for this Amendment to be entered and considered by the Examiner, then the Commissioner is authorized to charge such fee to Deposit Account No. 50-1358. Applicant's undersigned patent agent may be reached by telephone at (973) 597-2500. All correspondence should continue to be directed to our address listed below.

Respectfully submitted,

Date: 7/2/07

  
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